May 15, 2026

Item 1. Introduction.

Awaken Wealth Partners LLC is registered with the United States Securities and Exchange Commission as an investment adviser. Brokerage and investment advisory services and fees differ and it is important for you to understand the differences. Free and simple tools are available to research firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers and investing.

Item 2: What investment services and advice can you provide to me?

Awaken Wealth Partners provides investment advisory services to retail investors. The principal services we offer are investment management and financial planning. Investment management services are made available on a wrap fee program basis. We tailor your investment advisory services to match the investment objectives and financial needs which you provide to us. We monitor the holdings and performance of your investment management services account on an ongoing basis. For financial planning services clients whether we perform periodic reviews of provided recommendations is dependent upon our agreement with you. We provide investment management services on a discretionary basis pursuant to authority granted to us in your client agreement. Pursuant to this discretionary authority we are authorized to determine which securities are bought and sold, the total amount to be bought and sold, and the costs at which transactions will be affected. We generally do not limit the types of investments we utilize for clients, but generally utilize registered mutual funds, exchange traded funds, equity securities, corporate bonds, state and local municipality fixed income instruments, US government and agency securities and annuities, if we determine such investments fit within a client's objectives and are in the best interest of a client. We impose a minimum initial portfolio size of $500,000 to open an investment management services account. However, we reserve the right to accept or decline a potential client for any reason in our sole discretion. For additional information, please refer to our Form ADV Part 2A Brochure, especially Item 4 Advisory Business and Item 7 Types of Clients and Item 4.A Services Fees and Compensation and Item 5 Account Requirements and Types of Clients in our Form ADV Part 2A Appendix 1 Wrap Fee Program Brochure.

Questions to Ask Us:

Given my financial situation, should I choose an investment advisory service? Why or why not?
How will you choose the investments that you recommend to me?
What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?

Item 3 (part 1): What fees will I pay?

For investment management services we charge an asset based wrap program which is billed on a quarterly basis. For an asset based fee, the more assets that are in a client's investment management services account, the more a client will pay in fees. Therefore, we may have an incentive to encourage clients to increase the assets in his or her account. For financial planning clients we charge a fixed or hourly fee which is billed monthly, quarterly, upon the delivery of our recommendations or for such other period as agreed upon between you and us. Asset based wrap program fees will include most transaction costs and fees to a broker-dealer or bank that has custody of the client's assets and, therefore, are often higher than a typical asset-based investment management services fee. In addition to our asset based wrap program fee you will be responsible for other fees and expenses, such as fees/expenses charged by any subadvisor, mutual fund, exchange traded fund, separate account manager and any taxes or fees required by federal or state law, as well as commission and transaction fees for any transactions executed away from the program broker-dealer.

You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying. For additional information, see Item 5 Fees and Compensation of our Form ADV Part 2A Brochure and Item 4 Services, Fees and Compensation of our Form ADV Part 2A Appendix 1 Wrap Fee Program Brochure.

Question to Ask Us:

Help me to understand how these fees and costs might affect my investments. If I give you $10,000 to invest, how much will go to fees and costs, and how much will be invested for me?

Item 3 (part 2): What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?

When we act as your investment adviser, we have to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide to you. Here are some examples to help you understand what this means. For instance, we receive various benefits and services from the custodian that we recommend to you. For additional information, please refer to our Form ADV Part 2A Brochure, specifically Item 12 Brokerage Practices and our Form ADV Part 2A Appendix 1 Wrap Fee Program Brochure, specifically, Item 9 Additional Information.

Question to Ask Us:

How might your conflicts of interest affect me, and how will you address them?

Item 3 (part 3): How do your financial professionals make money?

Some of our financial professionals are paid pursuant to participation in firm profits as owners of the firm. Other financial professionals are paid pursuant to a combination of a salary and bonus. The bonus takes into consideration general individual performance as well as client revenue growth and firm revenue growth. Financial professionals paid pursuant to their ownership in the firm, or otherwise pursuant to a bonus taking into consideration client revenue growth and firm revenue growth are subject to a conflict of interest since increases in firm or client account revenue may lead to increases in financial professional compensation. Certain of our financial professionals serve as licensed insurance agents and in that capacity may recommend the purchase of certain insurance products to our clients. These financial professionals earn commissions and other fees on products sold in their capacity as insurance agents. While no commissions are earned by these financial professionals relative to any of our client investment management services accounts, this presents a conflict of interest because these financial professionals in their role as licensed insurance agents are incentivized to make recommendations based on the compensation received rather than on a client's needs. For additional information regarding our financial professionals' activities as insurance agents please refer to our Form ADV Part 2A Brochure, specifically Item 10 Other Financial Industry Activities and Affiliations and our Form ADV Part 2A Appendix 1 Wrap Fee Program Brochure, specifically, Item 9 Additional Information.

Item 4: Do you or your financial professionals have a legal or disciplinary history?

No. You can visit Investor.gov/CRS for a free and simple search tool to research our firm and our financial professionals.

Questions to Ask Us:

As a financial professional, do you have any disciplinary history? For what type of conduct?

Item 5: Additional Information

For additional information about our investment advisory services and to request a copy of our Form CRS, please contact us at 281-358-0134.

Questions to Ask Us:

Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer? Who can I talk to if I have concerns about how a person is treating me?